

New cost center and cost center change request forms are located in PeopleSoft under Employee Self Service.



Cost Center Request Forms

1. **Cost Center Request Form (Non-Grant)** – this request can be used to request all non- sponsored project cost centers:
 - State Funded
 - Designated
 - Auxiliary Enterprises
 - Restricted
 - Restricted Gifts for Research
 - Plant Fund
 - Loan
 - Agency
2. **Grant Cost Center Request Form** – this request can be used to request Sponsored Project and Cost Share cost centers only. This form can only be submitted by OPM (Office of Post Award Management).
3. **Endowment Cost Center Request Form** – this request can be used to request Principal Endowment and Endowment Gift cost centers. This form can only be submitted by Development and Accounting Operations.
4. **Plant Funding Request** – Used to request funding for Maintenance and Operations of Plant, Construction in Progress and other Capital Assets. *This form can only be used by Facilities Management and Accounting Operations.*

Cost Center Change Forms

1. **Attribute & Description Change Request** - used to request changes to descriptions and attributes (Owner, Manager, Alternate) changes for a cost center.
2. **Cost Center Change Request** - used to request chartfield value changes for non-sponsored or plant fund cost centers. Includes (fund code, department or function).
3. **Grant Cost Center Change Request** - used to request chartfield value changes for Sponsored projects and Cost share cost centers only. This request can only be submitted by OPM (Office of Post Award Management) Includes (fund code, department , function, Project or Activity).

4. **Plant Cost Center Change Request** - used to request chartfield value changes for plant funded cost centers only. This request can only be submitted by Plant Accounting. Includes (fund code, department, function, Project or Activity).

Searching and Filling out Forms

Navigation: Main Menu > Employee Self-Service > Forms > Search/Fill a Form

PeopleSoft provides the capability to Search for a form you have submitted. This can be done on the Find an Existing Values tab. Criteria below can be entered to assist with your search.

Favorites | Main Menu > Employee Self-Service > Forms > Search/Fill a Form

Search/Fill a Form

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

▼ Search Criteria

Sequence Number:	<input style="width: 100%;" type="text" value="="/>	<input style="width: 95%;" type="text"/>
Subject:	<input style="width: 100%;" type="text" value="begins with"/>	<input style="width: 95%;" type="text"/>
Form:	<input style="width: 100%;" type="text" value="begins with"/>	<input style="width: 95%;" type="text"/>
Document Key String:	<input style="width: 100%;" type="text" value="begins with"/>	<input style="width: 95%;" type="text"/>
Priority:	<input style="width: 100%;" type="text" value="="/>	<input style="width: 95%;" type="text"/>
Due Date:	<input style="width: 100%;" type="text" value="="/>	<input style="width: 95%;" type="text"/>
Approval Status:	<input style="width: 100%;" type="text" value="="/>	<input style="width: 95%;" type="text"/>

Case Sensitive

Limit the number of results to (up to 300):

Search

Clear

[Basic Search](#)

[Save Search Criteria](#)


Please note: You can ONLY view the forms you have created or approved.

Searching and Filling out Forms

1. In order to create a form you will need to click on the Add a New Value's tab.

Search/Fill a Form

Find an Existing Value | **Add a New Value**


Form: 

Add

2. Click on the magnifying glass to view all active forms that can be submitted.

Search/Fill a Form

Find an Existing Value | **Add a New Value**

Form: 

Add

Find an Existing Value | Add a New Value



Look Up Form

Form:

Portal Label:

Look Up **Clear** **Cancel** [Basic Lookup](#)

Search Results

View 100 First  1-9 of 9  Last

Form	Portal Label
CHANGE_REQ	Cost Center Change Request
CHG_GRANT1	Grants CC Change Request
DEL_FORM	Deleted Form
FUNDTEST	Fund Group Workflow
GRANT_REQ	New Grant Cost Center Request
NEWCC_REQ	New Cost Center Request Form
NEW_ENDWCC	Endowment Cost Center Request
PLANT_CHG	Plant CC Change Request

3. Once you select the form you need, click add.

Search/Fill a Form

Find an Existing Value

Add a New Value

Form:



4. The form will appear for you to fill out

Form | Instructions | Attachments

New Cost Center Request Form

*Subject:	<input type="text"/>		
Priority:	<input type="text" value="3-Standard"/>	Due Date:	<input type="text"/>
Status:	Initial		
*Requester:	<input type="text"/>	*Long Description:	<input type="text"/>
*Fiscal Year:	<input type="text"/>	*Short Description:	<input type="text"/>
*Date of Request:	<input type="text"/>	*Department:	<input type="text"/>
*Contact Number:	<input type="text"/>	*Function:	<input type="text"/>
*Email Address:	<input type="text"/>	*Fund Group:	<input type="text"/>
*Owner Name:	<input type="text"/>	*Owner Netid:	<input type="text"/>
*Manager Name:	<input type="text"/>	*Manager Netid:	<input type="text"/>
*Alternate Name:	<input type="text"/>	*Alternate Netid:	<input type="text"/>
			<input type="checkbox"/> Retain Funding
<i>Please provide information regarding how the cost center will be funded below. If funds will be transferred from another cost center to fund this new cost center, please provide the cost center in the space below.</i>			
Funding Source:	<input type="text"/>		
		Plant Accounting and Office of Post Award Only	
		Project id:	<input type="text"/>
		Activity id:	<input type="text"/>
		*** Plant Accounting and Systems Administration Only***	
		Fund Code:	<input type="text"/>
		Assigned Cost Center:	<input type="text"/>
More Information:			

- Once the form has been completely filled out, click save. You will have the option to review the form before submitting. Once reviewed click submit.

Form Instructions Attachments

Seq #: 52

New Cost Center Request Form

*Subject: Demo - Cost Center Request (Non-Academic)

Priority: 3-Standard Due Date:

Status: Initial

*Requester: Stephanie Williams *Long Description: Test

*Fiscal Year: 2014 *Short Description: Test

*Date of Request: 03/05/2014 *Department: 401000

*Contact Number: 2637 *Function: 713

*Email Address: sxw079000@utdallas.edu *Fund Group: 3000 - Designated

*Owner Name: Reda Bernoussi *Owner Netid: rbernou-utd

*Manager Name: Reda Bernoussi *Manager Netid: rbernou-utd

*Alternate Name: Terry Pankratz *Alternate Netid: tap130230-utd

Retain Funding

****Plant Accounting and Office of Post Award Only****

Project id:

Activity id:

**** Plant Accounting and Systems Administration Only****

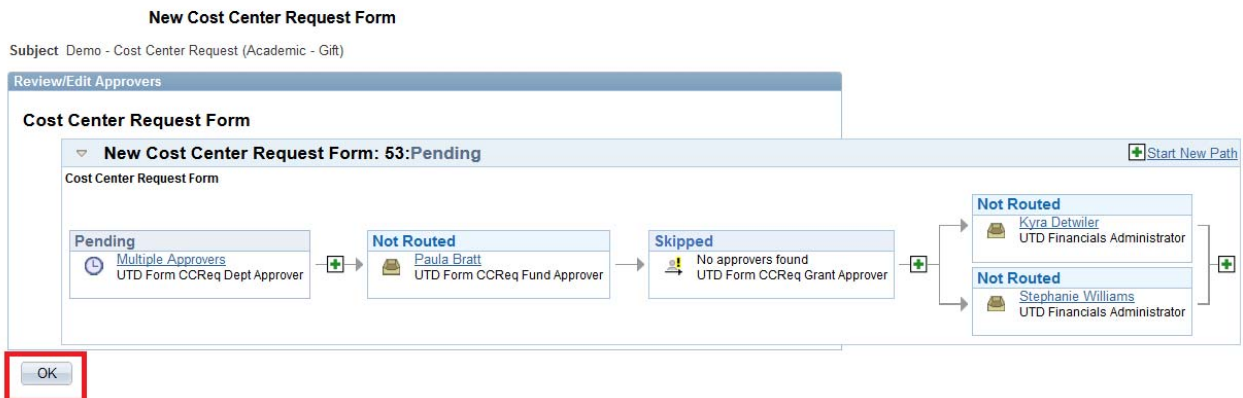
Funding Source:

Fund Code:

Assigned Cost Center:

More Information:

- Once submitted, you will be taken directly to the workflow page that displays who the form will route to next. Click ok, and you will be taken back to the form.



- Once your form is submitted into workflow, a Sequence number is assigned. This Sequence number is only specific to your form and can be used to check the status of your form at any time. This can be done on the "Find an Existing Value" tab of the Search/Fill a Form screen as indicated on page 2.

Form
Instructions
Attachments

Seq #: 53

New Cost Center Request Form

***Subject:** Demo - Cost Center Request (Academic - Gift)

Priority: 3-Standard

Status: Pending

***Requester:** Sallie Mae

***Fiscal Year:** 2014

***Date of Request:** 03/05/2014

***Contact Number:** 3351

***Email Address:** salliemae@utdallas.edu

***Owner Name:** Bert Moore

***Manager Name:** Bert Moore

***Alternate Name:** Susie Milligan

Please provide information regarding how the cost center will be funded below. If funds will be transferred from another cost center to fund this new cost center, please provide the cost center in the space below.

Funding Source:

Due Date:

Approver Status **Cancel Approval**

***Long Description:** Test

***Short Description:** Test

***Department:** 305000

***Function:** 401

***Fund Group:** 5000 - Restricted

***Owner Netid:** bmoore-utd

***Manager Netid:** bmoore-utd

***Alternate Netid:** smilliga-utd

Retain Funding

*****Plant Accounting and Office of Post Award Only*****

Project id:

Activity id:

***** Plant Accounting and Systems Administration Only*****

Fund Code:

Assigned Cost Center:

- Once your form has been approved, you will receive a confirmation by email.

[Form Approval] Form 75 (NEWCC_REQ) has been Approved

peoplesoft-fitst2@shared.utsystem.edu

Sent: Fri 3/14/2014 1:38 PM

To: Williams, Stephanie

Form 75 (NEWCC_REQ) has been approved. Details are shown below:

Subject: Restricted Gifts for Research - Test

Priority: 3

Due Date:

Requester: sxw079000-utd

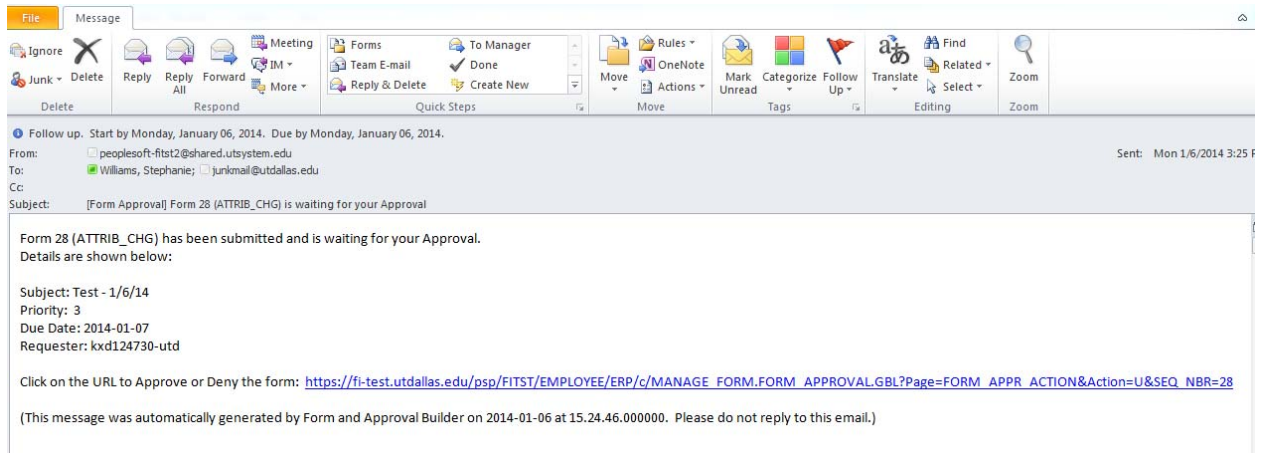
Click on the URL to access the form: https://fi-test.utdallas.edu/psp/FITST/EMPLOYEE/ERP/c/MANAGE_FORM.FORM_ADD.GBL?Page=FORM&Action=U&SEQ_NBR=75

(This message was automatically generated by Form and Approval Builder on 2014-03-14 at 13.37.58.000000. Please do not reply to this email.)

Approving New Cost center and Change request

Approval notification will be sent via email and added to your worklist.

Email Notification



If you do not want to go to your worklist or click on the email notification link, you can navigate directly to the **Approval/Review a Form** page. See the navigation below:

Main Menu > Manager Self-Service > Approve/Review a Form

Favorites | Main Menu > Manager Self-Service > Approve/Review a Form

Approval/Review a Form

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Sequence Number:	=	<input type="text"/>
Form:	begins with	<input type="text"/>
Subject:	begins with	<input type="text"/>
Priority:	=	<input type="text"/>
Due Date:	=	<input type="text"/>
Document Key String:	begins with	<input type="text"/>
Approval Status:	=	<input type="text"/>

Case Sensitive

Limit the number of results to (up to 300):

Search

Clear

Basic Search

Save Search Criteria

1. On the “Find an Existing Value” tab, you may search for a specific form indicated by the “Search Criteria”, or click the search button to view the Forms pending your approval. For example, you may search by the Sequence number or the Subject you assigned to your form.

[Favorites](#) | [Main Menu](#) > [Manager Self-Service](#) > [Approve/Review a Form](#)


Approval/Review a Form

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value


▼ Search Criteria

Sequence Number: =

Form: begins with 

Subject: begins with

Priority: =

Due Date: = 


Document Key String: begins with

Approval Status: =

Case Sensitive

Limit the number of results to (up to 300):

Search

[Clear](#)
[Basic Search](#)

[Save Search Criteria](#)

2. Once you click search, click on the form pending approval. The link will immediately take you to the Form approval page.

Search Results

View All First 1-12 of 12 Last

Sequence Number	Portal Label	Subject	Priority	Due Date	Document Key String	Approval Status
24	Cost Center Change Request	CC61040063	3-Standard	(blank)	(blank)	Approved
25	Plant CC Change Request	CC 52072062	3-Standard	(blank)	(blank)	Approved
26	Grants CC Change Request	cc 37255006	3-Standard	(blank)	(blank)	Approved
27	New Cost Center Request Form	Test	3-Standard	(blank)	(blank)	Cancelled
35	Cost Center Change Request	asdlkjadsflkj	3-Standard	(blank)	(blank)	Pending
77	New Cost Center Request Form	Testing 123	3-Standard	(blank)	(blank)	Approved
84	Endowment Cost Center Request	Testing cost center request	3-Standard	(blank)	(blank)	Denied
85	Endowment Cost Center Request	Test cost center request	3-Standard	(blank)	(blank)	Pending
88	Attribute & Description Change	Test Workflow	3-Standard	(blank)	(blank)	Approved
89	Attribute & Description Change	Test	3-Standard	(blank)	(blank)	Denied
90	Endowment Cost Center Request	Test	3-Standard	(blank)	(blank)	Approved
91	Attribute & Description Change	Deny Approval Test to see if the request is routed back to me	3-Standard	03/14/2014	(blank)	Denied

- Before you approve, click the “Go to Form” button in order to view the form. Once the form has been reviewed, click approve or deny button in the Approval Action box and make any comments needed.

Seq #: 85 **Endowment Cost Center Request**

Subject: Test cost center request

Go to Form

Approval Action

Comment

Approve **Deny**

Review/Edit Approvers

Endowment Cost Center Request: 85:Pending [Request Information](#)
[Start New Path](#)

1

Skipped
 No approvers found
 UTD Form CCRReq Dept Approver

→

Approved
 ✓ Kerry Freeman Jr
 UTD Form CCRReq FundCode Appr
 03/17/14 - 12:10 PM

→

Approved
 ✓ Kyra Detwiler
 UTD Financials Administrator
 03/17/14 - 1:38 PM

→

Pending
 ⌚ Stephanie Williams
 UTD Financials Administrator

- The form will then move to the next approver or route back to the requester if denied.
- Once the form is approved, the requester receives an email confirmation that their form has been approved.

[Form Approval] Form 80 (ATTRIB_CHG) has been Approved

peoplesoft-fitst@shared.utsystem.edu

Sent: Fri 3/14/2014 8:55 AM

To: Williams, Stephanie

Form 80 (ATTRIB_CHG) has been approved. Details are shown below:

Subject: Test Workflow 3
 Priority: 3
 Due Date:
 Requester: sxw079000-utd

Click on the URL to access the form: https://fi-test.utdallas.edu/psp/FITST/EMPLOYEE/ERP/c/MANAGE_FORM.FORM_ADD.GBL?Page=FORM&Action=U&SEQ_NBR=80

(This message was automatically generated by Form and Approval Builder on 2014-03-14 at 08.55.10.000000. Please do not reply to this email.)